



# State of Wisconsin • DEPARTMENT OF REVENUE

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NEXUS UNIT

1. Legal Name
2. Business Name (if different than above)
3. Type of Ownership (e.g., corporation, S-corporation, sole proprietor, partnership, limited liability company, trust, etc.)
4. Home Office Mailing Address
5. Wisconsin Address (NOTE: If a business location is maintained in Wisconsin by your firm, your employee(s) or representative(s), please give location, telephone number and number of persons located there, along with their duties.)
6.
  - a. Describe Product(s) You Sell
  - b. Describe Service(s) You Provide
7. Federal Employer Identification Number (and Social Security Number if a Sole Proprietor)
8. Date Income Year Ends
9. Is your company an exempt organization? ☐ Yes ☐ No If yes:
  - a. Exempt under what section of the Internal Revenue Code?
  - b. Does your company have any unrelated business income reportable on Federal Form 990-T? ☐ Yes ☐ No
10. If a Corporation:
  - a. State and Year of Incorporation
  - b. Has your company obtained a Certificate of Authority to transact business in Wisconsin? ☐ Yes ☐ No
  - c. Is your corporation related to any other(s) (parent, subsidiary, etc.) with business activities in Wisconsin? ☐ Yes ☐ No

If yes, please indicate the complete name, address and federal employer identification number of each related corporation, the manner in which it is related to your corporation and the type of business activities conducted in this state. Attach a separate sheet if necessary.

11. Is your company a partner, shareholder or member of a partnership, S-corporation or limited liability company that has operations, conducts business or owns real property in Wisconsin? ☐ Yes ☐ No

If yes, please indicate the complete name, address and federal employer identification number of the entity.

12. Is your company registered with any other Wisconsin state agency, (e.g., Unemployment Compensation, Workmen's Compensation, etc.)? ☐ Yes ☐ No

If yes, list agency.

13. Wisconsin business activity information:

- a. Has your company owned or paid rent for any real or tangible personal property located in Wisconsin, or stored any tangible personal property in Wisconsin? ☐ Yes ☐ No

If yes, give the earliest date property was owned, rented or stored; the type of property, location and value of property.

- (1) If your company owns goods in a Wisconsin warehouse, on consignment, or in the hands of a distributor or other non-employee representative in Wisconsin, are these goods used to fill orders for your customers in Wisconsin? ☐ Yes ☐ No

- b. Is your company listed in any telephone directories in Wisconsin? ☐ Yes ☐ No

If yes, please list the telephone number(s).

- c. Are Wisconsin home telephone numbers of any employees or representatives listed in local advertisements for your company? ☐ Yes ☐ No

- d. Does your company utilize a telephone answering service in this state? ☐ Yes ☐ No

If yes, please list the name and address of the answering service.

- e. Has your company paid any salaries, wages, fees or commissions to any persons living in Wisconsin? ☐ Yes ☐ No If yes:

(1) During what years?

(2) What were the duties of such persons?

- (3) Were any of the duties performed in Wisconsin? ☐ Yes ☐ No

- (4) Does your company have a standard form of written agreement with employees or representatives in Wisconsin, or a job description for such persons? ☐ Yes ☐ No

If yes, please enclose a copy (or copies) for our review.

- f. Have **you or employees** of your firm come into Wisconsin for the purpose of selling, demonstrating or taking orders? ☐ Yes ☐ No If yes:
- (1) During what years?
- (2) Do orders have to be sent outside Wisconsin for approval or rejection? ☐ Yes ☐ No
- (3) Has immediate delivery been made from a stock of goods available in this state?  
☐ Yes ☐ No
- g. Have **non-employee** representatives or agents of your firm come into Wisconsin for the purpose of selling, demonstrating or taking orders? ☐ Yes ☐ No If yes:
- (1) During what years?
- (2) Do orders have to be sent outside Wisconsin for approval or rejection? ☐ Yes ☐ No
- (3) Have they made immediate delivery from a stock of goods carried with them, or otherwise available to them in this state? ☐ Yes ☐ No
- h. Have **you** or any of your **employees/representatives** performed any business activities in Wisconsin other than selling, demonstrating or taking orders? For example, such as in (3) below. ☐ Yes ☐ No If yes:
- (1) During what years?
- (2) How frequently per year, in terms of activity days? (One person for one day is an activity day.)
- (3) For what purpose(s)? (For example: purchasing activity, installations, construction, assembly or repair of equipment, conducting credit investigations, collecting payments, conducting training classes or seminars for customers or their personnel in the operation, repair or maintenance of your products, issuing credit memos, exchanging or picking up unsuitable merchandise, resolving complaints, arranging advertising, etc.; attach sheets if necessary.)
- i. Has your company **sold** ☐ Yes ☐ No, or **leased** ☐ Yes ☐ No, any of its products or other tangible personal property to Wisconsin customers? If yes:
- (1) During what years?
- (2) At **retail** to consumers or users ☐ Yes ☐ No; or at **wholesale** for resale? ☐ Yes ☐ No
- (3) What type of tangible personal property was sold or rented to Wisconsin customers?
- (4) Is product given to the customer at the time of sale? ☐ Yes ☐ No
- j. Has your company licensed intangible rights for use in Wisconsin? ☐ Yes ☐ No If yes:
- (1) During what years?
- (2) What type of intangible rights?

k. Has your company sold real estate, services or intangibles in Wisconsin? ☐ Yes ☐ No If yes:

(1) During what years?

(2) What type of real estate, services or intangibles?

l. Has your company distributed free samples of its products in Wisconsin? ☐ Yes ☐ No

If yes, during what years?

m. Has your company used any tangible personal property in Wisconsin on which no sales or use tax has been paid? ☐ Yes ☐ No If yes:

(1) Describe the property.

(2) During what years?

n. Has your company made deliveries into Wisconsin using a company operated vehicle? ☐ Yes ☐ No  
If yes:

(1) During what years?

(2) How frequently?

(3) Are return for-hire trips (back-hauls) made? ☐ Yes ☐ No

(4) Are sales made by the vehicle driver(s)? ☐ Yes ☐ No

14. List all the states in which your company conducts business.

15. List your company's Wisconsin sales and use tax account number and/or withholding tax account number, if any.

16. List your Company's website address.

Please provide any additional information which may be useful in determining whether your company has a filing requirement for franchise/income tax or sales and use tax purposes. Attach separate sheets to this questionnaire, if necessary.

Preparer \_\_\_\_\_  
(Please Print or Type)

Signature \_\_\_\_\_

Title \_\_\_\_\_

Telephone Number \_\_\_\_\_

Date \_\_\_\_\_